Status of Proposed Arizona Best Practice

- This document identifies the process description and proposed best practices for metering activity for customer switches.
- The information contained in the document is based on current and proposed business practices identified by the UDCs and Competitive Providers.
- Where applicable, the issue number from the Issues list is noted. The document covers the following:
  - Consensus -- UDC & Provider Process (consensus was accomplished and processes agreed upon)
  - Utility (UDC) Tariff/Article/Protocol Differences (consensus but differences are shown by UDC such as site meet charges, etc.)
  - No Consensus (description of each UDCs process).

UDC Business Rule/Proposed Arizona Best Practice Combined Documents Comparison
Bundled Customer (meter exchange required) to Direct Access

UDC Process Description -- Assumptions				
SRP	**TEP**	**APS**	**Citizens Utilities (CUC)**	**~~Trico~~AZ Cooperatives**
Phase I (now until 12/31/00)– Customers with loads of 1mW and above are eligible for competitive metering (MSP). **Phase II** (12/31/00 and beyond) All customers are eligible for competitive metering. Customers with yearly loads of 100,000 kWh and above require installation of IDR metering. SRP can continue to provide metering services upon request.	Customers with loads greater than 20 kW require IDR metering. TEP will no longer provide MSP services to any DA commercial customers or residential customers with loads greater than 20kW. (Pending waiver to allow UDCs to provide MSP and MRSP services to Commercial Load Profiled customers.)	Customers with loads greater than 20 kW require IDR metering. APS will no longer provide MSP services to any DA commercial customer or residential customers with loads greater than 20kW (Pending waiver to allow UDCs to provide MSP and MRSP services to Commercial Load Profiled customers.)~~.~~	Customers with loads greater than 20 kW require IDR metering. CUC will no longer provide MSP services to any DA commercial customers or residential customers with loads greater than 20kW. (Pending waiver to allow UDCs to provide MSP and MRSP services to Commercial Load Profiled customers.)	Customers with loads greater than 20 kW require IDR metering. Coops can provide MSP services to any DA commercial customer or residential customers as long as they are not competing outside of the service territory R14-2-1615C.

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus (NC)
ESP sends Enrollment DASR SRP = Connect 814 All other Utilities = Request for Service (RQ) DASR	ESP Services receives DASR and forwards to appropriate department within the UDC organization. Any timing requirements are specified within individual organizations. The PSWG DASR Group will handle any standardization needed. This is the first high level step in the entire process	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
UDC sends existing meter attributes etc. to MSP/ESP	The form that the UDCs will use to communicate existing meter attributes to MSP/ESP will be called the EMI (Existing Meter Information) form. **Timing Requirements:** The EMI and the Equipment Purchase Authorization (EPA) will be sent within 5 workdays of receiving the DASR acceptance notification indicating a pending meter exchange. These documents will be in Excel and will be sent via email.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

MSP/ESP sends scheduling information to UDC. (Issue #40) **9-00 EPA portion, pending further discussion**	The name of the form that the MSPs will use to communicate scheduling information to the UDCs will be called the MDCR (Meter Data Communication Request) form. **Timing Requirements:** The initial MDCR Form and the EPA (if applicable) must be returned at least 5 workdays prior to the exchange. These documents will be in Excel and will be sent via email. Notification of changes to the schedule, including rescheduling and unscheduling must be sent to the UDC by 2:00 pm (Arizona time) 1 workday prior to the scheduled work date. UDC will communicate any exceptions to the MSP within 2 workdays of the receipt.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
MSP/ESP sends information about newly installed meter and required UDC meter information to the UDC	The name of the form that the MSPs will use to communicate information about newly installed meters and UDC meter information to the UDCs will be called the MIRN (Meter Installation/Removal Notification) form. **Timing Requirements:** Return of the Form: MSP must return MIRN form no later than 3 workdays from the day of the exchange. This document will be in Excel and will be sent via email. Return of the Meter: The meter must be returned to the UDC within 15 workdays of the removal. Drop off sites, shipping options, charges for damaged/lost meters, etc. will vary between UDCs.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
What is the period of time that an MSP cannot exchange the meter? (**Blackout Window.**) (Issue # 53)				**SRP** – No blackout window **TEP** – 5 calendar days prior to a read date **APS** – No blackout window **CUC** – No blackout window **Trico** – 5 day blackout period ~~around~~ before the read date **Navopache** – 5 calendar days prior to read date

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
MSP exchanges meter -- When does ESP take responsibility for meter/customer? (Issue # 35)				**SRP** – Exchange must be complete 10 workdays prior to the actual DA switch date/read. SRP is responsible for billing generation consumption until the switch date. The ESP takes responsibility the first minute after midnight on the switch/read date. If a meter exchange takes place after the switch, the ESP takes responsibility for billing the generation consumption. **TEP** – ESP takes responsibility the first full 15 minute interval after the DA meter is installed and programmed. ~~upon removal of the TEP meter.~~ **APS** – ESP is responsible for meter/customer the first full 15 minute interval for a commercial customer with loads over 20 kW that the new meter is in the socket. ~~For customers with residential loads under 20 kW, the ESP would be responsible for the first 60-minute interval.~~ **CUC** – ESP is responsible upon removal of CUC meter. **Trico** – ESP is responsible upon removal of Trico meter ~~the 1st 60-minute interval after the meter exchange.~~ **Navopache** – When the final meter reading is taken or at 12:01 am on the first day of the next billing cycle following meter exchange.

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus

Who is responsible for the usage while the meter is out of the socket during the exchange? (Issue # 35) If the form is not marked to require LRC and the MSP doesn't do it, what will the UDCs do? Or, if is marked and the MSP didn't do it…what is the UDC process? ((9-00 Pending Lost Registration Proposal)) **9-00 Re-opened – Pending further discussion/proposals -- Proposal on the table is that if meter is out of the socket more than 15 minutes, the MSP will clock the disk and calculate the current kW or equivalent (displayed instantaneous kW on meter) and indicate on the MIRN. What**				**SRP** – If the switch to DA has not yet taken place, SRP is responsible for calculating lost registration while the meter is out of the socket. If the switch to DA has already taken place, the MSP is responsible for calculating the lost registration. Stopwatch check is to be used. **TEP** – ~~ESP takes responsibility of consumption once MSP removes TEP meter.~~ If any meter is out of the socket more than 15 minutes the MSP will clock the disk and calculate the current kW of equivalent (displayed instantaneous kW on meter) and indicate it on the MIRN. This only has to be done after the new meter is installed. TEP will use that figure across the entire time period the meter is out of the socket. **APS** – If the meter is out of the socket during the exchange greater than 15 minutes, APS requires the MSP to calculate the "lost registration" and add it to the out-read on the APS meter. A stopwatch check is to be used. **CUC** – ESP is responsible for consumption at the time CUC's meter is removed. The MSP is responsible for calculating the lost registration. A stopwatch check is to be used. **Trico** – The ESP/MSP is responsible. A stopwatch check is to be used. **Navopache** (NEC)– ESP/MSP is responsible after the UDC meter has been removed.

MISC BUSINESS PROCESSES				
UDC Process Description	**Proposed AZ Best Practice**	**Consensus -- UDC & Provider Process**	**Utility (UDC) Tariff/Article/Protocol Differences**	**No Consensus**
Handling of Load Research for customers going DA. (Issue # 37)	If a current load research account switches to DA, UDCs will select another sample except for TEP as noted. Handling of communications is different as noted.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**SRP** – Phone lines are customer-owned. May lease SRP phone lines. **APS** – Disconnect any APS dedicated phone line. **TEP** – In most cases, TEP will select another sample. TEP will not allow third parties to use TEP owned phone lines. TEP will not select another sample for customers served under Rate 14 and will be evaluated on a case by case basis. **CUC** – Disconnect any CUC dedicated phone line. **Trico** – Disconnect any Trico dedicated phone line or communication hardware. **Navopache** (NEC) – Disconnect any communications hardware.	
Process for handling damaged/altered equipment discovered by the MSP before exchange is done. This includes all metering equipment.	Call the UDCs Metering Point of Contact for coordination of work and the UDC will generate a field order. The UDC will contact MSP when the work is complete. UDCs will assess the problem within 2 business days.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Billing ESP, MSP, customer for equipment, work performed, non-returned meters, site meet charges, etc.	UDCs will bill ESP (, MSP, MRSP and/-or customer if applicable) at least monthly for equipment, work performed, non-returned meters, site meet charges, etc. from the previous month.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
What are the UDC rules associated with installation of external devices?		)		**TEP** External devices can be used from an approved meter with a KYZ output for billing. Meter must have a visual display of kWh and kW. External recorder can not be used as totalization-recording device. The point of attachment to energize the recorder will be on the load side of the test switch for transformer rated installation, and on the bolt just above the cut in straight bolts for self-contained installation. This will be a fused jumper formt he point of attachment to the external recorder. **APS** Still under review **SRP** Still under review
Site Meet & Scheduling Policy (Issue # 68):				

When is a site meet required?	Site meets are required for all UDC owned dedicated substations and may be required for customer loads 1 mW or greater or when other special metering equipment is in place, at the discretion of the UDC.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**CUC** – Will also take any required primary system outages for CT/PT exchanges due to safety considerations. **Trico** – Requires a site meet for everything that is not self-contained.	
Scheduling Pending Resolution of EPA see MDCR instructions.	MSP returns the MDCR and EPA form with estimated scheduling information and pending ownership information. Additional phone coordination is required for site meets. **Timing Requirements:** Form must be returned at least 5 workdays prior to the exchange. (Also, see MDCR form information pg 2)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
MSP Missed Appointments	If the MSP fails to arrive within 30 minutes of the appointment time, or if the MSP fails to cancel at least one workday in advance, the UDC may charge. (UDC Services & Fees schedules/tariffs/protocols are subject to change)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	~~**SRP --** 1-hour labor ($85) will be charged. The SRP journeyman will leave a meter tag that indicated SRP was on site.~~ ~~**TEP --** $37 during working hours & $55 for after hours.~~ ~~**APS --** $30 per site for Phx metro and $75 per site for other areas.~~ ~~**CUC --** To be determined~~ ~~**Trico --** Fee up to $75~~ ~~**Navopache --** Actual time and mileage spent on getting to the site.~~	

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
UDC Missed Appointment	If the UDC fails to arrive within 30 minutes of the appointment time, or if the UDC fails to cancel at least one workday in advance, the UDC may credit the ESP or the UDC may be charged by the ESP.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	~~**SRP** -- 1 hour labor time will be credited. MSP must leave a meter tag indicating they were on site.~~ ~~**TEP** – The ESP/MSP may charge TEP based on the same conditions set forth in TEP's requirements of the ESP/MSP.~~ ~~**APS** – No current policy exists~~ ~~**Trico** -- Trico may credit the labor time or pay a fee of up to $75.~~ ~~**Navopache** -- The ESP/MSP may charge NEC based on the same conditions set forth in NEC's requirements of the ESP/MSP.~~	

Site Meet Charges	Site meet charges may apply. The charges may vary depending upon UDC's Services & Fees schedules and are subject to change.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**SRP** -- $25 per site **TEP** -- $37 per hour during normal working hours (6:00 am to 2:30 pm) and $55 during after hours (2:31 pm to 5:59 am). **APS** -- $30 per site for Phx Metro and $75 per site for all other areas requested by an MSP. APS may assess an additional charge of $30 per hour for site meets that exceed 30 min. **CUC** – Undetermined **Trico** – May charge a service fee of $75 per site meet and $30 per man-hour for site meets that exceed 30 min. These meets are also subject to overtime rates. **Navopache** (NEC) – NEC will charge $31/hour during normal working hours (8:00 am to 5:00 pm); $46/hr after normal working hours plus mileage @ $0.65/mile in both cases.	

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Changes to site meet schedule	If there are changes to the anticipated meter exchange time/date – the MSP must notify the UDC via the MDCR by 2:00 pm (Arizona Time), one (1) workday prior to the exchange date. (See also pg 2 MDCR info)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
Access Issues: (Issue #33)				

Key Process Issues: • Keys cannot be copied. • Liability -- customer authorization. • Locking types: dual locking device, lockboxes, utility locks, etc.	Customer Lock: MSP will need to make arrangements with the customer to gain access to customer's metering equipment. UDCs will not provide customer keys to MSPs/ESPs. In order to ensure necessary site access in the event of an emergency, the MSP must notify the UDC on the MIRN within 3 workdays of any changes in meter access at a customer site. Utility Lock: If there is just a UDC lock at the site, the MSP can cut the lock. The MSP must install a mutually approved dual locking device in order to accommodate the MSP and UDC lock. UDCs may provide open CAP (Customer Access Padlocks) locks to the MSP/ESP to use in securing the site with the dual locking device. The MSP must advise the UDC on the MIRN form that the lock was cut and a UDC padlock was secured. The ESP or MSP may be charged for the lock in accordance with the UDCs applicable service fees. The ESP and MSP can request a site meet with the UDC to gain access. Site meet charges may apply.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	~~**CUC** -- A double hasp lock will be provided by the MSP to accommodate a CUC padlock. If the MSP installs their own lock, a square D padlock is required.~~	

EQUIPMENT OWNERSHIP -- What is the process for handling the purchase of CT/PTs, Meters and Associated Equipment. (Issues 32, 44, 54)				
UDC Process Description	**Proposed AZ Best Practice**	**Consensus -- UDC & Provider Process**	**Utility (UDC) Tariff/Article/Protocol Differences**	**No Consensus**
Voltage level of ownership.	ACC Rules indicate who **may** own but discussion generated a need for clarification on the best practice for who **will** own at each voltage level.			
	• Zero up to and including 600 volts.			**SRP** -- SRP, MSP, ESP and customer may own. **TEP** -- TEP, MSP, ESP and customer may own. But TEP requires the ESP to **maintain**. **APS** ~~--~~ – APS only ~~MSP, ESP and customer may own.~~ **CUC** -- CUC, ESP, MSP may own. **Trico** -- Trico only **Navopache** (NEC) -- NEC, MSP, ESP and customer may own.
	• Greater than 600 volts up to and including 25 kV.			**SRP** -- SRP, MSP, ESP and customer may own **TEP** -- TEP, MSP, ESP and customer may own. But TEP requires the ESP to **maintain**. **APS** ~~--~~ – APS only ~~MSP and ESP~~ **CUC** -- **Must** be owned by ESP or MSP **Trico** -- Trico only **Navopache** (NEC) -- NEC will own

	• Greater than 25 kV -- owner will be UDC only. • Exceptions: Equipment in UDC dedicated substations regardless of voltage classification. Customer owned substations would be considered on a case by case basis.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**CUC** -- ESP or MSP **must** ~~lease~~ rent from CUC	

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Who is responsible for maintenance of CT/VPTs?	Maintenance and servicing of metering equipment will be limited to the UDC, the ESP, or the MSP. (Note: originally owner was specified but if customer is owner they cannot maintain.)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
Equipment Purchase -- An EPA (Equipment Purchase Authorization) will be sent with the EMI giving equipment pricing & Information.				
Meters	Will UDCs sell new (from stock) and/or existing meters?			**SRP** -- will sell existing in field ~~or new (from stock).~~ **TEP** --will sell new meters (from stock). **APS** -- will sell new meters (from stock). **CUC** -- will not sell new from stock. **Trico** -- Not applicable. **Navopache** (NEC) -- will not sell meters.
CT/VTs	Will UDCs sell new (from stock) and/or existing CT/VTs?			**SRP** -- will sell ~~new (from stock) and~~ existing. **TEP** --will sell new (from stock) and existing. **APS** ~~--~~ Not applicable ~~will sell new (from stock) and existing.~~ **CUC** -- will not sell new from stock but will sell existing. **Trico** -- Not applicable. **Navopache** (NEC) -- will not sell CT/VTs.

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Associated Equipment	Will UDCs sell new (from stock) and/or existing Associated Equipment			**SRP** -- will sell ~~new (from stock) and~~ existing. **TEP** --will sell new (from stock) and existing. **APS** ~~--~~ Not applicable ~~will sell new (from stock) and existing.~~ **CUC** -- will not sell new from stock but will sell existing. **Trico** -- Not applicable **Navopache** (NEC) -- will not sell associated equipment.
Equipment Costs:				
What are the costs for purchasing equipment?	Equipment costs vary by UDC, some are undetermined and/or not applicable if they are not going to sell. If applicable, the EPA (Equipment Purchase Authorization) form will specify.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**TEP** -- Cost of new meter plus $5 handling fee. **APS** ~~--~~ Not applicable ~~On installed equipment, material/labor minus 5-year depreciation.~~	

Direct Access to Bundled Service Customer– (Meter exchange required with Meter Services contracted through ESP)

((Note: The Proposed AZ Best Practice column was documented by SRP, TEP, APS and John Wallace from Grand Canyon State Electric Cooperative Association. All other Participants need to verify for consensus))

UDC Process Description -- Assumptions						
SRP	**TEP**	**APS**	**Citizens Utilities (CUC)**	**Trico**	**Navopache (NEC)**	**Other**
Assumptions: • ESP initiates the DASR • Meter is not owned by the Utility • Utilities will perform the meter exchange to return the customer to Bundled Service. DA meters is removed and Utility meter is installed.	**Assumptions:** • ESP initiates the DASR • Meter is not owned by the Utility • Utilities will perform the meter exchange to return the customer to Bundled Service. DA meters is removed and Utility meter is installed.	**Assumptions:** • ESP initiates the DASR • Meter is not owned by the Utility • Utilities will perform the meter exchange to return the customer to Bundled Service. DA meters is removed and Utility meter is installed.				

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus (NC)
~~**Step 1** – ESP Sends~~ ESP Sends appropriate DASR to return the customer to Bundled Service SRP = Disconnect 814 All other Utilities = TS Termination of Service (TS) DASR ~~*(#1 in Meter Data Element Comparison Document)*~~	ESP Services receives DASR and forwards to appropriate department within the UDC organization. Any timing requirements of the DASR are specified within individual organizations. The PSWG DASR Group will handle any standardization needed. This is the first high level step in the entire process	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

UDC Sends MDCR with Scheduling information	MDCR is always sent to the ESP and the MRSP. In cases where the MSP owns the meter, the MDCR will be sent to them as well. UDC sends scheduling information and pending ownership at least 5 working days prior to meter exchange **Exceptions:** ESP will communicate any exceptions on the MDCR to the UDC and MRSP ~~MDCR~~ within 2 business days of the receipt of the exception. **Changes to the Schedule:** Notifications of changes to the schedule, including the re-scheduling and un-scheduling, must be sent to the ESP and MRSP from the UDC by 2:00 p.m. one business day prior to the scheduled work date	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

What is the process to ensure that all meter data is in before the account goes back to bundled service? How does UDC verify with the ESP that all the data is complete? If data is incomplete how does UDC notify ESP? (data from a previous billing cycle not final bill data). This is being referred to VEE as of 9/27/00 but left here to make sure it is covered and does not need to be part of the Bus Rule Doc.				**APS** APS will review each account before sending the MDCR to verify that all meter read data has been submitted by the MRSP up to that point. As stated above, the ESP has 2 days to submit any exceptions to the MDCR.

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus

What is the UDC's timeline, (minimum and maximum) for exchanging meters? ESPs would like some time frame for exchanging the meters. Schedule should be like when customer is going from Bundled to DA. ESPs would like to see the existing meter be left and used by the UDC.				**SRP** At least 10 workdays prior to the next scheduled meter read date. If applicable, SRP provides the interim IDR data to the MRSP via an 867. **TEP** Exchange will be based on volume submitted by the ESP, manpower, location and special timing requirements requested by the ESP. TEP will not exchange meters 5 calendar days prior to the read date (black out window). **APS** Exchange will be based on volume submitted by the ESP, manpower, location and special timing requirements requested by the ESP. **CUC** **Navopache** **Trico**

ESP Sends Equipment Purchase Authorization (EPA) to UDC (if applicable) Does the ESP have timing requirements for the EPA? **PENDING**				
UDC sends signed EPA to ESP **PENDING**				

UDC sends MIRN with information about newly installed meter to the ESP and MRSP	UDC Sends MIRN to ESP and MRSP **Timing Requirements:** Return of the Form: UDC will return MIRN form no later than 3 workdays from the day of the exchange. This document will be in Excel and will be sent via email. Return of the Meter: The UDC will return the meter within 15 workdays of the removal. Recipient of the meters: UDC will contact the ESP, via e-mail to determine if the meters will be shipped or ~~dropped off~~picked up. If the MSP owns the meter, the UDC will contact the MSP via e-mail and cc: the ESP. ESP may have a prearranged shipping location	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
What are the costs associated with shipping meters back to the recipient?				**SRP –** SRP may charge for shipping meters **TEP –** TEP will charge for shipping meters **APS –** APS will charge $6.00 per box for shipping. (Charge is based on an average of the current UPS ground rates and includes $500 insurance per box) **CUC** **Trico** **Navopache**

What is the recipients process for tracking the return of meters? (i.e. process for meters not returned etc.) What do the UDCs need from the ESPs to track the meter?				
What is the period of time that a UDC cannot exchange the meter? (**Blackout Window.**) (Issue # 53)				**SRP** – No blackout window **TEP** – 5 calendar days prior to a read date **APS** – No blackout window **CUC** – No blackout window **Trico** – 5 day blackout period ~~around~~ before the read date **Navopache** – 5 calendar days prior to read date

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
UDC exchanges meter -- When does the ESPs responsibility for meter/customer end and the UDCs responsibility begin? (Issue # 35)				**SRP** –On switch date/read date **TEP** – When TEP installs the UDC meter **APS** –When APS installs the UDC meter **CUC** – after the new meter is successfully installed. **Trico** – **Navopache** –

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Who is responsible for the usage while the meter is out of the socket during the exchange? (Issue # 35)				**SRP** – ESP **TEP** –ESP **APS** – ESP **CUC** – **Trico** – **Navopache** .

What is the requirement for the MRSP to post final meter data? Janie will take this question to the VEE Group to make sure processes are developed and they coincide with ours.				**SRP** SRP requires the MRSP to post data up through the last full 15 minute interval prior to the new UDC meter installation. Date and time will be determined from the MIRN submitted by SRP ("New mete~~e~~r set time".) The meter data from the time of the new UDC meter installation time up through Midnight the day before the read date, will be provided by SRP to the ESP via 867. **TEP** TEP requires the MRSP to post data up through the last full 15 minute interval prior to the new UDC meter installation. Date and time will be determined from the MIRN submitted by TEP. ("New meter set time".) **APS** APS requires the MRSP to post data up through the last full 15 minute interval prior to the new UDC meter installation. Date and time will be determined from the MIRN submitted by APS. ("New meter set time".)

MISC BUSINESS PROCESSES				
UDC Process Description	**Proposed AZ Best Practice**	**Consensus -- UDC & Provider Process**	**Utility (UDC) Tariff/Article/Protocol Differences**	**No Consensus**
Process for handling damaged/altered equipment discovered by the ~~MSP~~UDC before exchange is done. This includes all metering equipment. **PENDING EPA DISCUSSION** **Assumption: Once the EPA process is agreed upon for the initial switch to DA, the reverse would be true for the return to Standard Offer from DA.**	Call the UDCs Metering Point of Contact for coordination of work and the UDC will generate a field order. The UDC will contact MSP when the work is complete. UDCs will assess the problem within 2 business days. Someone else's equipment in the field and it is damaged? UDCs need to develop a process.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Billing UDC for non-returned meters, site meet charges, etc.	ESPs will bill UDCs at least monthly for non-returned meters, site meet charges, other charges as determined from other scenarios, etc.	NEW ASPES		
Billing ESP, MSP, customer for equipment, work performed, non-returned meters, site meet charges, etc.	UDCs will bill ESP (, MSP, MRSP or customer, if applicable) at least monthly for equipment, work performed, non-returned meters, site meet charges, etc. from the previous month.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
Site Meet & Scheduling Policy (Issue # 68):				
When is a site meet required?			**CUC** – Will also take any required primary system outages for CT/PT exchanges due to safety considerations. **Trico** – Requires a site meet for everything that is not self-contained.	**SRP, TEP, APS** Site meet will be based upon ESP requests Citizens (CUC) Trico Navopache (NEC) APSES APSES may require a site meet when there is special metering equipment etc.
Scheduling	UDC sends MDCR with scheduling information. Additional phone coordination is required for site meets. **Timing Requirements:** Form must be returned at least 5 workdays prior to the exchange. (Also, see MDCR form information pg 2)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		

MSP Missed Appointments	If the MSP fails to arrive within 30 minutes of the appointment time, or if the MSP fails to cancel at least one workday in advance, the UDC may charge. (UDC Services & Fees schedules/tariffs/protocols are subject to change)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**SRP** -- 1-hour labor ($85) will be charged. The SRP journeyman will leave a meter tag that indicated SRP was on site. **TEP** -- $37 during working hours & $55 for after hours. **APS** -- $30 per site for Phx metro and $75 per site for other areas. **CUC** -- To be determined **Trico** -- Fee up to $75 **Navopache** -- Actual time and mileage spent on getting to the site.	

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
UDC Missed Appointment	If the UDC fails to arrive within 30 minutes of the appointment time, or if the UDC fails to cancel at least one workday in advance, the UDC may ~~credit the ESP or the UDC may~~ be charged by the ESP.	~~SRP~~ ~~TEP~~ ~~APS~~ ~~Citizens (CUC)~~ ~~Trico~~ ~~Navopache (NEC)~~	~~**SRP** -- 1 hour labor time will be credited. MSP must leave a meter tag indicating they were on site.~~ ~~**TEP** – The ESP/MSP may charge TEP based on the same conditions set forth in TEP's requirements of the ESP/MSP.~~ ~~**APS** – No current policy exists~~ ~~**Trico** -- Trico may credit the labor time or pay a fee of up to $75.~~ ~~**Navopache** -- The ESP/MSP may charge NEC based on the same conditions set forth in NEC's requirements of the ESP/MSP.~~	

Site Meet Charges	Site meet charges may apply. The charges may vary depending upon ~~UDC's~~ ESPs Services & Fees schedules and are subject to change.	~~SRP~~ ~~TEP~~ ~~APS~~ ~~Citizens (CUC)~~ ~~Trico~~ ~~Navopache (NEC~~)	~~**SRP** -- $25 per site~~ ~~**TEP** -- $37 per hour during normal working hours (6:00 am to 2:30 pm) and $55 during after hours (2:31 pm to 5:59 am).~~ ~~**APS** -- $30 per site for Phx Metro and $75 per site for all other areas requested by an MSP. APS may assess an additional charge of $30 per hour for site meets that exceed 30 min.~~ ~~**CUC** – Undetermined~~ ~~**Trico** – May charge a service fee of $75 per site meet and $30 per man-hour for site meets that exceed 30 min. These meets are also subject to overtime rates.~~ ~~**Navopache** (NEC) – NEC will charge $31/hour during normal working hours (8:00 am to 5:00 pm); $46/hr after normal working hours plus mileage @ $0.65/mile in both cases.~~	**SRP, TEP, APS** ESP may charge for a site meet APSES APSES will charge the UDC for site meets if the UDC requires it and APSES doesn't feel it is necessary

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Changes to site meet schedule	If there are changes to the anticipated meter exchange time/date – the UDC must notify the MSP via the MDCR by 2:00 pm (Arizona Time), one (1) workday prior to the exchange date~~. (See also pg 2 MDCR info)~~	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
Access Issues: (Issue #33)				
Key Process Issues: ~~• Keys cannot be copied.~~ ~~• Liability -- customer authorization.~~ • ~~Locking types: dual locking device, lockboxes, utility locks, etc~~.	.	)	~~**CUC** -- A double hasp lock will be provided by the MSP to accommodate a CUC padlock. If the MSP installs their own lock, a square D padlock is required~~.	**SRP, TEP, APS** UDC will make arrangements with the customer to gain access. ESP will request any locking devices be returned with the meter, if applicable. (ESPs will advise)

EQUIPMENT OWNERSHIP -- What is the process for handling the purchase of CT/PTs, Meters and Associated Equipment. (Issues 32, 44, 54)				
UDC Process Description	**Proposed AZ Best Practice**	**Consensus -- UDC & Provider Process**	**Utility (UDC) Tariff/Article/Protocol Differences**	**No Consensus**
Voltage level of ownership.	ACC Rules indicate who **may** own but discussion generated a need for clarification on the best practice for who **will** own at each voltage level.			
	• Zero up to and including 600 volts.			**SRP** -- SRP, MSP, ESP and customer may own. **TEP** -- TEP, MSP, ESP and customer may own. But TEP requires the ESP to **maintain**. **APS** -- only MSP, ESP and customer may own. **CUC** -- CUC, ESP, MSP may own. **Trico** -- Trico only **Navopache** (NEC) -- NEC, MSP, ESP and customer may own.
	• Greater than 600 volts up to and including 25 kV.			**SRP** -- SRP, MSP, ESP and customer may own **TEP** -- TEP, MSP, ESP and customer may own. But TEP requires the ESP to **maintain**. **APS** -- only MSP and ESP **CUC** -- **Must** be owned by ESP or MSP **Trico** -- Trico only **Navopache** (NEC) -- NEC will own
	Greater than 25 kV -- owner will be UDC only. • Exceptions: Equipment in UDC dedicated substations regardless of voltage classification. Customer owned substations would be considered on a case by case basis.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**CUC** -- ESP or MSP **must** lease from CUC	

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Who is responsible for maintenance of CT/PTs?	Maintenance and servicing of metering equipment will be limited to the UDC, the ESP, or the MSP. (Note: originally owner was specified but if customer is owner they cannot maintain.)	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)		
Equipment Purchase -- An EPA (Equipment Purchase Authorization) will be sent with the EMI giving equipment pricing & Information.				
Will the UDCs purchase/transfer ownership of non UDC owned equipment in the field. (i.e. meter, CT/VTs and associated equipment)' Need to consider "new site" customers.				
Meters	Will UDCs sell new (from stock) and/or existing meters?			**SRP** -- will sell existing in field or new (from stock). **TEP** --will sell new meters (from stock). **APS** -- will sell new meters (from stock). **CUC** -- will not sell new from stock. **Trico** -- Not applicable. **Navopache** (NEC) -- will not sell meters.

~~CT/VTs~~	~~Will UDCs sell new (from stock) and/or existing CT/VTs?~~			~~**SRP** -- will sell new (from stock) and existing.~~ ~~**TEP** --will sell new (from stock) and existing.~~ ~~**APS** -- will sell new (from stock) and existing.~~ ~~**CUC** -- will not sell new from stock but will sell existing.~~ ~~**Trico** -- Not applicable.~~ ~~**Navopache** (NEC) -- will not sell CT/VTs.~~

UDC Process Description	Proposed AZ Best Practice	Consensus -- UDC & Provider Process	Utility (UDC) Tariff/Article/Protocol Differences	No Consensus
Associated Equipment	Will UDCs sell new (from stock) and/or existing Associated Equipment			**SRP** -- will sell new (from stock) and existing. **TEP** --will sell new (from stock) and existing. **APS** -- will sell new (from stock) and existing. **CUC** -- will not sell new from stock but will sell existing. **Trico** -- Not applicable **Navopache** (NEC) -- will not sell associated equipment.
Equipment Costs:				
What are the costs for purchasing equipment?	Equipment costs vary by UDCESP, some are undetermined and/or not applicable if they are not going to sell. If applicable, the EPA (Equipment Purchase Authorization) form will specify.	SRP TEP APS Citizens (CUC) Trico Navopache (NEC)	**TEP** -- Cost of new meter plus $5 handling fee. **APS** -- On installed equipment, material/labor minus 5-year depreciation.	
Miscellaneous				
What are the rules associated with the removal of non-UDC owned external devices?				

~~If the form is not marked to require LRC and the MSP doesn't do it, what will the UDCs do? Or, if is marked and the MSP didn't do it…what is the UDC process?~~				
How do UDCs handle a customer requested disconnect for UDC or ESP? How do we differentiate between a DA customer and Bundled customer? What type of training?				